

SSP iSwift

Solutions to increase adviser productivity and reduce costs.

No other IT solutions provider offers this level of cost-effective flexibility, making SSP iSwift a unique product.

Your challenges.

When looking to increase profits, financial advisers have two main challenges: to reduce the number of back-office staff and increase the number of advisers. Building efficiencies and cutting costs whilst simultaneously driving growth is – as it sounds – not easy. But a key element in achieving this is the effective use of technology and access to an IT system with the flexibility to help you grow.

Your solution: SSP iSwift.

SSP iSwift is a unique, component-based system that offers access and point-of-sale tools to advisers and provides a single solution that supports straight-through processing. The system is modularised to allow the tailoring of the solution to each client's specific requirements, and its Sky Pricing model means you only pay for the modules that you need, rather than an entire package. No other IT solutions provider offers this level of cost-effective flexibility, making SSP iSwift a unique product.

How iSwift can help your business.

Increased productivity.

SSP iSwift's tailored suite of tools is designed to increase your productivity through automation and smart client management. From our user-friendly Financial Agenda programme to the Suitability Report Writer tool, each component of the package helps you work faster, smarter and more accurately.

Point-of-sale tools.

Helping you automate and standardise sales practices is a key benefit of SSP iSwift. Modules such as Fact Find, online valuation, planning assistance and straight-through processing make your sales processes easier to manage and more efficient. Available in the field via SSP iSwift's web portal, they also provide on-hand information as and when you need it.

Reduced administration costs.

With the added pressure of the Retail Distribution Review (RDR), advisers will need to become more efficient at gaining and servicing clients. In order to do this, they will need to increasingly utilise technology and have more decision points for themselves and for their clients. SSP iSwift empowers advisers to manage more of the client service process quickly and easily. By combining the right tools for your business's needs, significant cost and time savings will reduce your administrative burden and streamline your operations.

Smart management information.

Quality, targeted information is vital to businesses and to the individual. SSP iSwift offers a management information dashboard delivering appropriate, real-time information on clients, cash and compliance tailored for the adviser, office or business. This reduces the demand on back-office admin teams while giving the adviser up-to-date, accurate information with which to manage their business.

Simple is better than complex.



Key benefits.

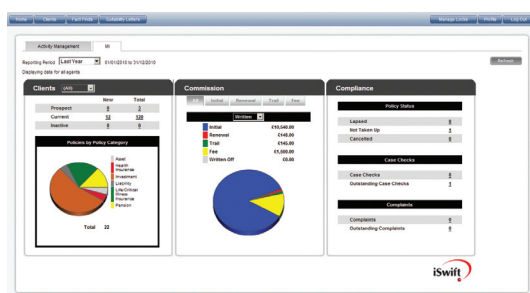
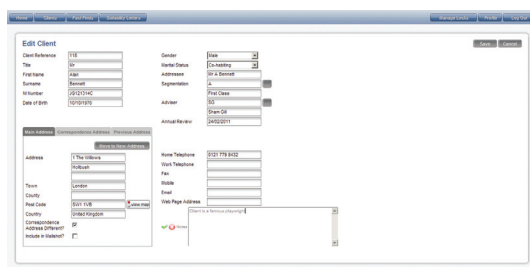
- Adviser autonomy leading to a reduction in back-office staff costs.
- On-demand, web-based access, anytime, anywhere.
- Increased productivity through key performance indicators.
- Single source of data reducing re-keying and paper processing costs.
- Compliant, efficient processing – reducing unit cost of production and lowering business risk.
- Improved customer service through access to clients.
- Efficient, in-depth portfolio reporting for effective client servicing.
- Instant valuations.

On-demand access.

Electronic valuations are the number one priority for increasing efficiency and reducing the back-office staff burden while improving customer service. SSP iSwift therefore offers the ability to obtain electronic, real-time valuations at the click of a button – anytime, anywhere.

Using any web-enabled device, including laptops, iPads and other tablet devices, users can access the entire range of SSP iSwift data. From the Fact Find data capture tool to client Portfolio Reports containing value, fund data, unit position, bid price and additional business line-related data, efficient, user-friendly client management tools are accessible 24/7.

SSP iSwift gives advisers all the tools they need to increase productivity and offer a better service to clients. Backed by both the financial strength of SSP and a comprehensive R&D roadmap, SSP iSwift is a tailored solution for any client management system.

The screenshot shows the 'Edit Client' form in the SSP iSwift system. The form is divided into several sections: Client Reference, Personal Details, Address, and Contact Information. Each section contains various input fields for text, dates, and dropdown menus. The form is designed for efficient data entry and management of client information.

For further information on SSP iSwift, call us now on **0800 590 705** or visit www.ssp-worldwide.com/sspforfinancialadvisers

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